

Use this guide as a checklist to set up your program from start to finish. Any task that is **Teal** is a required task that must be completed prior to moving forward or completing your interview day.

Interested in purchasing an Add-on feature? Contact the **Thalamus Sales Team today!**



1. Update Program & Administration

- Add all program interviewers and administrators**
- Update Program Profile
- Add program Track/s**
- Upload a program video & link social media pages



2. Setup Calendar & Waitlists

- Create calendar dates**
- Set available spots for each track & tier**
- Customize calendar settings
- Customize waitlist settings



3. Emails, Surveys, & Rosters

- Create & customize email templates
- Set Interview Reminder email interval
- Create survey questions



4. Scoring Algorithms & Reports

- Create and customize scoring algorithms
- Provide scoring information to interviewers
- Customize Roster templates



Application Review in **cortex**

*Add-on

- Bulk Print PDF applications from ERAS
- Upload PDF files to Cortex
- Set up algorithms, filters, and blinders
- Review applications and set status
- Export selected applicants to Thalamus



5. Import Applicants to Thalamus

- CORTEX** - Import applicants from Cortex
- ERAS - Setup CSV export template in ERAS
- ERAS - Export applicants to CSV
- NON-ERAS** - Create CSV template
- Import CSV into Thalamus**



6. Setting Status & Inviting Applicants

- Assign a Tier to all applicants**
- Assign Track/s to all applicants**
- Create and assign applicant tags
- Invite applicants**
- Send any survey questions



7. Itinerary Builder -OR- Itinerary Wizard

- Set Thalamus video or integrate 3rd party API video program
- Create interview sessions by running the **Itinerary Wizard** -OR-
- Manually create itinerary sessions
- Publish finalized itineraries**

*Add-on



9. Video Chat & Master View

*Add-on

- Review all troubleshooting video chat documents
- Test video chat amongst your program staff and interviewers
- Connect 3rd party video app to Thalamus via API
- View and manage the Thalamus video interview sessions through the Master View**



10. Create and Export Rank List

- Auto create rank list based on overall score
- Customize rank list by manually ranking applicants
- Mark "Matched" applicants
- Create match composite
- Export rank list & applicant data